



Module 5

Manage Your IDP



Manage Your IDP

This module will review all of the activities involved in managing your IDP.

It includes information on:

- Starting Work on Activities
- Tracking Your Progress
- Following Up with Your Supervisor
- Revising Your IDP
- Preparing for Next Year
- Copying Your Goals into a New IDP





Start Work on Activities

Once you have submitted an IDP and it has been approved/activated, you will be able to:

- View or add notes to any of your activities
- View item details for SATERN offerings
- Request a schedule for instructor-led SATERN offerings
- Register for scheduled SATERN offerings
- Launch SATERN online content
- Track your progress on any of your activities





Start Work on Activities (cont.)

For any activity in your IDP, you will be able to view and add notes about the activity.

- In the **View/Add Notes** section, you can add details about the activity (e.g., program dates, contact information).

The screenshot shows a web interface for an Individual Development Plan (IDP). At the top, there are tabs for 'Development' and 'Personal'. Below them is a 'Title:' input field and an 'Add Description' button. A 'Group By:' dropdown menu is set to 'Section'. To the right are 'Field Chooser' and 'New Goal' buttons. A section titled 'Section Name: MID-RANGE GOALS: 2 - 4 YEARS(1)' contains a table with columns: 'Goal Name', 'Target Date', 'Priority', 'Percent Toward Target', and 'Remove'. The first row shows 'Develop people management skills' with a target date of '9/30/2012' and priority 'Improve skill set/may not be current job'. A 'View/Add Notes' button is next to it. Below this is a 'Details' section with a sub-header 'Activities (1)'. It contains a table with columns: 'Name', 'Due Date', 'Type', 'Priority', 'Target/Stretch', and 'Remove'. The first row is 'Leadership Development Assignment' with a due date of '9/30/2012', type 'External Activities (Activities Not in the Catalog such as OJT, Academic Courses, Conferences, Seminars)', priority 'For mission objectives/job requirements', and target/stretch '480 / 800'. A 'View/Add Notes' button is circled in green, and a green arrow points to it from a callout box that says 'Click View/Add Notes.'.

Goal Name	Target Date	Priority	Percent Toward Target	Remove
Develop people management skills	9/30/2012	Improve skill set/may not be current job		View/Add Notes

Name	Due Date	Type	Priority	Target/Stretch	Remove
Leadership Development Assignment	9/30/2012	External Activities (Activities Not in the Catalog such as OJT, Academic Courses, Conferences, Seminars)	For mission objectives/job requirements	480 / 800	View/Add Notes





Start Work on Activities (cont.)

To view detailed information about any SATERN offering, click **View Item Details**.

- If you are ready to begin an online offering, click **Launch content**.

<u>Name</u> ▲	<u>Due Date</u>	<u>Type</u>	<u>Priority</u>	<u>Status</u>	<u>Target / Stretch</u>	<u>Remove</u>
COMMUNICATION AND LEADERSHIP	12/30/2011	Catalog Item		In progress	<div>View/Add Notes</div> <div>Edit</div> <div>Launch content</div> <div>View Item Details</div>	

Click **Launch content** to begin a course.

Click **View Item Details** for full course details.





Start Work on Activities (cont.)

If the item is instructor led, then one of two buttons will display.

You can:

- **Request Schedule** for an unscheduled offering

HQ-HRU-MERIT SYSTEM PRINCIPLES AND PROHIBITED PERSONNEL PRACTICES	12/31/2012	Catalog Item	Must be registered	1 /	View/Add Notes
					Edit
					Request Schedule
					View Item Details





Start Work on Activities (cont.)

- **Register** for a scheduled offering
 1. Click on **Offering Details**

Name ▲	Due Date	Type	Priority	Status	Target / Stretch	Action	Remove
APPEL- FUNDAMENTALS OF SYSTEMS ENGINEERING	9/3/2010	Catalog Item		Must be registered		View/Add Notes Edit Offering Details View Item Details	

2. Under **Available Scheduled Offerings**, click on **Register**

Available Scheduled Offerings							
Days	Start ▲	End	Location	Available Seats	Price	Action	
5	4/12/2010 08:00 AM PST	4/16/2010 05:00 PM PST	NASA AMES CONFERENCE CENTER (ARC) - ARC-NACC (BLDG.3), BALLROOM	30	0.00 (USD)	View Details Register	
5	4/19/2010 08:00 AM EST	4/23/2010 05:00 PM EST	GSFC-Building 1 - GSFC-Building 1-Room E100D	30	0.00 (USD)	View Details Register	





Track Your Progress in the IDP

To track your progress, go to the **My IDPs and Goals** screen.

- You will see that your **IDP Status** is **Active/Approved**.

My IDPs and Goals

The details of this plan are shown below. You may update the Status of Goals and Activities. Additionally, you may add or edit Goals to Goals. However, if you have made changes since the Plan was last approved, you must submit the Plan for Approval again. Only approved plans may be viewed. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan. As a Coach, you may view / update or add other User's Plans.

IDP Title : Systems Engineering (Select Other IDP) IDP Period : Calendar Year 2010

IDP Status : Active/Approved (Expires 323 days from now) ▶ IDP Purpose : To support a shift to systems engineering

Version : 1 (current) ▼

Effective Date: 11/1/2010 Expiration Date: 12/31/2010

When you update your progress, your plan will automatically calculate your progress toward your goals.





Track Your Progress in the IDP (cont.)

The next two slides show you how to track progress on your activities on **External Activities** for a **Competency-Based Goal** with *no Target Value*.

- This means that the activity is not numerically measured.

Goal Name ▲	Target Date	Priority	Percent Toward Target	Action	Remove		
▼ Systems Engineering	9/3/2010		0.00% 0 <input type="text"/> 0 Current:0 Target:1	View/Add Notes Move Goal Edit			
Details							
▼ Activities (1)							
Add Activity ▼							
Name ▲	Due Date	Type	Priority	Status	Target / Stretch	Action	Remove
UMD ENPM 641 Systems Concepts, Issues and Processes	8/31/2010	External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)		NotStarted ▼		View/Add Notes Edit Update Activity Status	





Track Your Progress in the IDP (cont.)

The **Status** column allows you to select the level of progress you've made toward completing your activity. You can choose from three options: **Not Started**, **In Progress**, or **Completed**.

- Be sure to save your recorded status by clicking on **Update Activity Status**.

Section Name: SHORT-RANGE GOALS: 1 YEAR(1)

Goal Name ▲	Target Date	Priority	Percent Toward Target	Action	Remove
▼ Systems Engineering	8/31/2010		0.00% 0 <input type="text"/> 0 Current:0 Target:1	View/Add Notes Move Goal Edit	×

Details

▼ Activities (1)

Name ▲	Due Date	Type	Priority	Status	Target / Stretch	Action	Remove
UMD ENPM 641 Systems Concepts, Issues and Processes	8/31/2010	External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)		<div>1</div> <div>Not Started ▼ Not Started In Progress Completed</div>		View/Add Notes Edit Update Activity Status	×

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Click **Update Activity Status**.





Track Your Progress in the IDP (cont.)

The next slide shows you how to update progress on an **External Activity** with a **Target Value**.

- In this example, the activity is a development rotation that will last for 480 hours (12 weeks), and of which 40 hours have been completed.

▼ Activities (1)							Add Activity ▼
Name	Due Date	Type	Priority	Status	Target / Stretch	Action	Remove
Leadership Development Assignment	9/30/2013	External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)	Improve skill set/may not be current job	NotStarted / 0.00%	480 / 520	<div>View/Add Notes</div> <div>Edit</div> <div>Update Activity Status</div>	
				Current: <input type="text" value="0"/>			

Target Value must be less than the **Stretch Value**.





Track Your Progress in the IDP (cont.)

This example uses hours as a measurement but you could also use days, weeks, or months.

Name	Due Date	Type	Priority	Status	Target / Stretch	Action	Remove
Leadership Development Assignment	9/30/2013	External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)	Improve skill set/may not be current job	InProgress / 8.00% Current: 40	480 / 520	<div>View/Add Notes</div> <div>Edit</div> <div>Update Activity Status</div>	

3 **In Progress** updates automatically to reflect the percentage of the target value that has been completed.

1 Enter the number of hours you have completed in the **Current** column.

2 Click **Update Activity Status**.





Track Your Progress in the IDP (cont.)

There are two types of activities that you do *not* need to update manually:

1. **Catalog Items** in SATERN will automatically record completion.
2. **External Activities** requiring a **SF-182**: if you complete a SF-182 to enroll or register for a development activity, the NSSC will record completion of your activity.

When you complete a catalog item or an activity that requires a SF-182, the activity will automatically be listed in your Learning History.





Follow Up with Your Supervisor

It's a good idea to meet with your supervisor about half-way through the year. Your mid-term performance review is an opportunity to do so.

These meetings provide an opportunity to discuss:

- Your progress on your development activities
- Your satisfaction with the activities
- Any mid-year adjustments to your IDP





Revise Your IDP

If mid-course adjustments or changes are necessary, you can revise your approved IDP by:

- Going to the **Career** tab and selecting **IDP**
- Selecting the IDP you wish to revise
- Clicking **Edit** next to the goal and/or activity

Goal Name ▲	Percent Toward Target	Target Date	Priority	Goal Status	Action	Remove	
▼ Systems Engineering	0.00% 0 4 Current:0 Target:1	9/3/2010			View /Add Notes Move Goal Edit		
Details							
▼ Activities (4)							
Add Activity ▼							
Name ▲	Due Date	Type	Priority	Status	Target/Stretch	Action	Remove
APPEL- FUNDAMENTALS OF SYSTEMS ENGINEERING	9/3/2010	Catalog Item		Must be registered		View /Add Notes Edit Offering Details View Item Details	






Revise Your IDP


When you revise your IDP, the IDP will receive a new version number.

- All previous versions will remain, and you can view them by choosing the desired version in the **Version** drop down.

Also, when you revise your IDP, whether adding or removing goals or activities, you will be required to re-submit your IDP for approval.

My IDPs and Goals 

The details of this plan are shown below. You may update the Status of Goals and Activities. Additionally, you may add or edit Goals to the Plans. You may add or edit supporting Activities for those Goals. However, if you have made changes since the Plan was last approved, you must submit the Plan for Approval again. Only approved Goals and Activities are reflected in the Performance Review. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan Title and select a different Plan. If you have been designated as a Coach, you may view / update or add other User's Plans.

IDP Title : Systems Engineering (Select Other IDP)	IDP Period : Calendar Year 2010
IDP Status : Active/Approved (Expires 310 days from now) ▶	IDP Purpose : To support a shift to systems engineering
Effective Date: 1/1/2010	Version : <div>2 (current)  2 (current) 2 (original) 1</div>
Expiration Date: <input type="text"/>	<input type="text"/>





Prepare for Next Year

It is never too early to start thinking about the next year.

Prepare for further development by:

- Thinking about new goals that build upon the ones you have already set and achieved
- Being on the lookout for new learning opportunities
- Discussing your ideas with a coach or mentor
- Creating a draft IDP for the upcoming year





Copy Your Current Goals into a New IDP

If you would like to build on your current goals in the coming year, you can copy your goals into a new IDP

- Go to the **My IDP and Goals** page and click **List all IDPs**.

My IDPs and Goals

The details of this plan are shown below. You may update the Status of Goals and Activities. Additionally, you may add or edit Goals to the Plans. You may add or edit supporting Activities for those Goals. However, if you have made changes since the Plan was last approved, you must submit the Plan for Approval again. Only approved Goals and Activities are reflected in the Performance Review. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan Title and select a different Plan. If you have been designated as a Coach, you may view / update or add other User's Plans.

IDP Title : Systems Engineering (Select Other IDP)

IDP Period : Calendar Year 2010

This IDP contains changes that have not been approved.

IDP Purpose : To support a shift to systems engineering

IDP Status : Active/Approved (Expires 317 days from now) ▶

Version : 1 (current) ▼

Effective Date: 1/1/2010

Expiration Date: 12/31/2010

Print IDP

List all IDPs

View/Add Notes

Submit for Approval

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Copy Your Current Goals Into a New IDP (cont.)

Once on the IDPs screen, click **Create New IDP** button to create a new IDP.

IDPs

Below is a list of all your IDPs. To view an IDP, choose the **View IDP** option for that IDP. If you have permission and the IDP is editable, choose the **Edit IDP** option for that IDP. If you have permission and you want to begin the process of creating a new IDP, choose the **Create New IDP** option.

IDP Title	IDP Period	IDP Status ▲	Effective Date	Expiration Date	Action
Systems Engineering	Calendar Year 2010	Active/Approved	1/1/2010 12:00 AM EST	12/31/2010 12:00 AM EST	View IDP Notes Create New IDP

Click **Create New IDP**.

Prepare → Create → Finalize → Manage



Copy Your Current Goals into a New IDP (cont.)

You will enter your plan information as usual, but you will select the option to **Copy Goals and Activities from Active IDP**.

1. **Select** the goals you would like to copy by checking the appropriate boxes in the last column.
2. Click **Add** button.

The screenshot shows a web application window titled 'Copy Goals and Activities from Active IDP'. It contains a table with the following columns: Goal Name, Goal Description, Target Date, Competency Related, IDP Area, Complete, Percent Toward Target, and Select. A single row is visible with the goal 'Systems Engineering', target date '9/3/2010', competency 'Yes', IDP area 'Development', and 'Complete' status 'No'. The 'Percent Toward Target' is shown as '0.00%' with a progress bar. The 'Select' column has a checkbox. Above the table are links for 'Select All / Deselect All'. Below the table, there are checkboxes for 'Copy Activities' and 'Add / Reset' buttons. A green circle highlights the 'Select' checkbox, and another green circle highlights the 'Add' button. A green arrow points from a text box to the 'Select' checkbox, and another green arrow points from a text box to the 'Add' button.

Goal Name	Goal Description	Target Date	Competency Related	IDP Area	Complete	Percent Toward Target	Select
Systems Engineering		9/3/2010	Yes	Development	No	0.00%	<input type="checkbox"/>

Select the appropriate goals and activities.

Click **Add**.



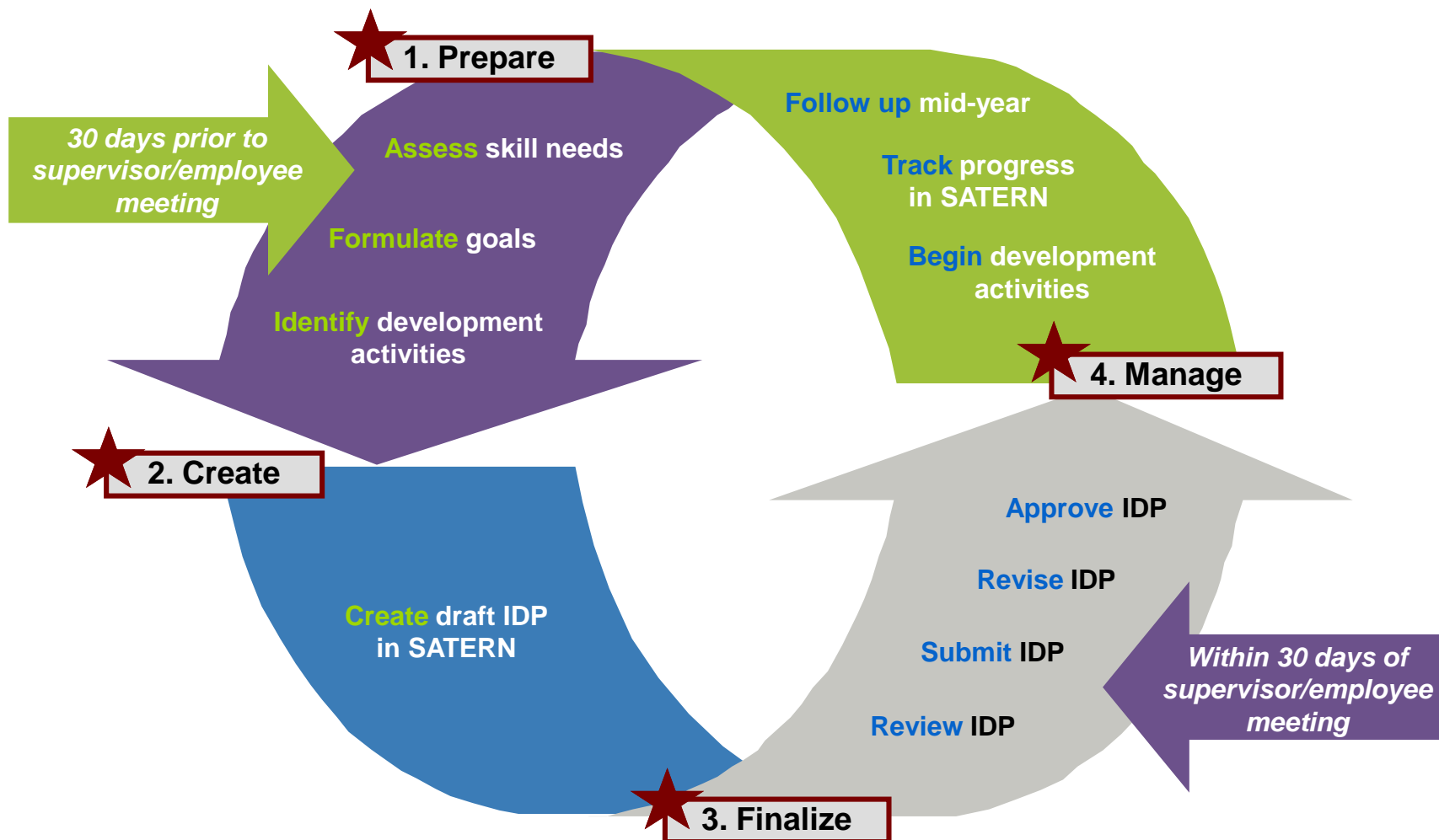


IDP Overview for Learners

Summary



IDP Process Phases





Summary

- The Individual Development Planning functionality in NASA's SATERN learning management system provides a real-time tool to help you manage your development goals and activities.
- As priorities and needs change, you should revisit your IDP; if you do not accomplish everything, it may indicate a change in priorities.
- Communication between you and your supervisor is a beneficial aspect of creating an IDP.
- The IDP tool in SATERN is available 24/7 and is accessible via the Web.
- Support for the IDP in SATERN is available via the NSSC Contact Center and through your Center Training Office.
- Job aids and FAQs can be accessed at <https://saterninfo.nasa.gov>.